



# *Exercise Guide for*

## *PA420*

### *Leave of Absence*

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## 2.1 - Exercise: Leave of Absence – Medical

### Scenario


Janet Thomas is a permanent employee who works at the Department of Commerce. She has the following leave balances: 240 sick and 240 vacation. Effective today, she is going out on FMLA due to her husband's serious medical condition. She expects to be out for a total of 12 weeks. Janet has not indicated that she wishes to use any of her leave for this LOA.

There are three parts to this Exercise; however you will only be responsible for Parts I and III:



- I Initiate Workflow (WF)
- II Wait for approved PCR (LOA does not go to Funding Approver)
- III Process Approved PCR

### Part I – Initiate Workflow as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.





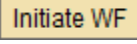

1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click . The Employee Action Request screen displays.
3. Enter the following data:

Field	Value
<b>Personnel number</b>	Use the Janet Thomas personnel number that is assigned to your student number from the Data Set.
<b>Effective on</b>	Today's date
<b>Action Type</b>	Leave of Absence
<b>Reason</b>	FMLA

4. Click Enter .
5. Click Create . The second screen of the Employee Action Request screen displays.
6. Enter the following data:

Field	Value
<b>Annual Salary</b>	Same as her current salary (hint: look in Current column)

7. Click Enter .

8. Click Save . The Information pop-up displays with the assigned PCR number.
9. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
10. Click  to close the pop-up.
11. Click Services for Object . The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
12. Select Create > Create Note.
13. Enter a note title.
14. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.
15. Click the green check  to close the notes. If applicable, close the notes icon menu.
16. Click . The Information pop-up displays indicating that the PCR has been submitted.
17. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen). You must now wait until the PCR has been approved and is returned to your Inbox.
18. Click the Back button to return to the Easy Access screen.




## Part II - Instructor or Navigator will Approve the PCR


Note to instructor and navigator: There is one approval level:

- Agency



## Part III – Process Approved PCR as Initiator

**NOTE:** In this exercise, you are processing an employee who already has an existing record; therefore, each infotype will have a warning message that the previous record will be delimited. Enter to bypass the warning message.

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  to expand it and click .
3. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:
  - a. Select (do not double click) the PCR to select it.
  - b. At the bottom of the screen, click the Ad hoc object “header” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee’s name and PCR number).

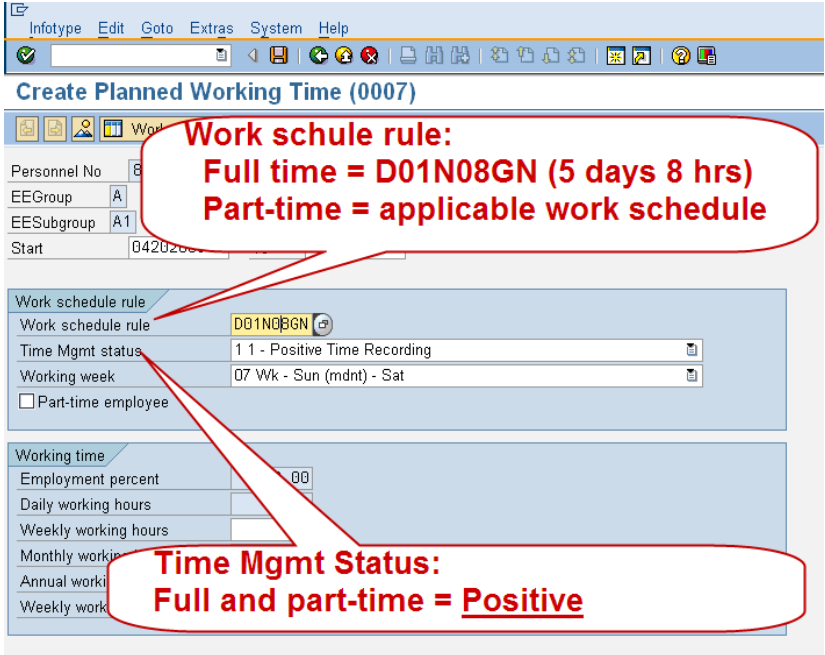
- c. At the Employee Action Request screen, click the Services for Object button to review the notes or attachments.
  - d. Select Attachment List.
  - e. Highlight the line item for the note.
  - f. Double click or use the eyeglasses.
  - g. Highlight the entire note, including the title.
  - h. Right click and select Copy. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
  - i. Click X to close the Display note popup.
  - j. Click X to close the Services for Objects popup. . **It is a best practice to make sure the PCR is closed before you process the approved PCR Actions** because an open PCR uses a lot of memory.
  - k. Click the Back button.
4. With the PCR still selected, click the Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).
  5. On the Personnel Actions screen, enter:

Infotype/Field	Value
<b>From</b>	Today's date (should always be the same that you entered on WF).
<b>Action Type</b>	Leave of Absence.

6. Click Enter .
7. Click Execute .
8. Complete the following fields:


Infotype/Field	Value
<b>Actions (0000)</b>	
Reason for Action	Observe the field defaulted from WF.
Reference Per. No	Leave blank.
Position	Observe the field defaulted from WF.
E Group/Subgroup	Observe the field defaulted from WF.

Infotype/Field	Value
Enter note copied from WF	<p>From the menu bar:</p> <ul style="list-style-type: none"> <li>• Select Edit</li> <li>• Maintain text.</li> <li>• Press Enter if a warning message displays indicating that person and position have different group/subgroup</li> <li>• Use Ctrl+V (or use the Insert button) to paste the note from the PCR.</li> <li>• Click Save.</li> <li>• Click <b>Enter</b> and <b>Save</b> as needed to bypass warning messages again.</li> </ul>
<b>Organizational Assignment (0001)</b>	<p>All fields should have defaulted from WF</p> <p><b>Enter</b> and <b>Save</b>.</p>
<b>Monitoring of Tasks</b>	<p>To view a list of your tasks, you must run the SAP <i>Date Monitoring Report</i> (transaction S_PHO_48000450) or B0099 from BI.</p>
Task Type	Estimated Return Date.
Date of Task	Use the calendar icon to select the date when the 12 weeks will end.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Comments	<p><b>NOTE:</b> Since the comments do not wrap at the end of the line, use the Edit &gt; Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following:</p> <p>&lt;your name, date&gt; <i>The employee is expected to return to work at the end of 12 weeks.</i></p> <p>Click <b>Save</b> to save the note. Observe the note icon displays as part of the infotype.</p> <p>Click <b>Save</b> again to save the infotype.</p>
<b>Delimit Objects on loan (0040)</b>	<p>Click Next Record icon.</p> <p>In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employee returns the items, you would then delimit the infotype.</p>

Infotype/Field	Value
<b>Planned Working Time (0007)</b>	<p>If necessary, make the following selections:</p> <ul style="list-style-type: none"> <li>Enter <b>D01N08GN</b> in the Work schedule rule field.</li> <li>Change the Time Mgmt status to Positive Time Recording</li> </ul>  <p><b>IMPORTANT!</b> All full-time employees must be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use <b>D01N08GN</b>. Part-time employees can be kept on their applicable part-time schedule.</p> <p><b>All employees</b> whether full-time or part-time <u>must</u> be positive time recording.</p> <p>When you reinstate an employee, the 0007 infotype displays as part of the Reinstatement Action. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.</p> <p><b>Enter and Save.</b></p>
<b>Subtypes for infotype Absences pop-up</b>	<b>X</b> close out for this scenario because the employee has not elected to use any leave for this LOA.
<b>Subtypes for infotype</b>	<b>X</b> close out for this scenario because the employee has not

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Infotype/Field	Value
Time Quota Pop-up	elected receive a lump sum payout.

9. Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).
10. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item  Complete Work Item . **NOTE:** It is critical that you complete this last step.



## Questions

Answer the following questions.

### Question 1

When the employee returns to work from a leave of absence, what Action will you use to return the employee?

A.

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### Question 2

What purpose does the Monitoring of Tasks infotype serve?

A.

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### Question 3

Where do you receive a list of the tasks that you have entered in the Monitoring of Tasks Infotype?

A.

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### Question 4

Assume that 12 weeks have passed and Janet indicates she needs an additional 3 weeks to care for her husband. She has the proper documentation. What steps do you take?

A.

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This exercise is complete.

## 2.2 - Exercise: Leave of Absence – Military Training

### Scenario

Ray Cryar has been given orders to report the first day of next month for 120 hours of military training. According to PT50, Ray does not have 120 military training left. That means that Ray will have to either go on some hours of unpaid leave or use his accrued leave for the remaining hours. Ray has decided to use vacation. You will have to determine how many hours vacation to use and then process the leave accordingly.




The LOA Action has four parts; however you will only be responsible for Parts I, III and IV.

- I Initiate Workflow (WF)
- II Wait for PCR to be approved (LOA does not go to Funding Approver)
- III Process Approved PCR
- IV Process PA30 to use vacation for remaining hours

### LOA #1 (process military training hours)

#### Part I – Initiate Workflow (WF) as Initiator


Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. Enter **PT50** in the Command field on the Easy Access screen and press or click Enter.
2. Enter the employee's personnel number and press or click Enter.
3. Click  All.
4. Click  Absence quotas. The Quota Overview screen displays.
5. Write down the number of hours shown in the Rem. Column of the following leave types:
  - Military Leave Training \_\_\_\_\_
  - Vacation \_\_\_\_\_
6. Based on the number of Military Leave Training hours available, how many vacation hours must be used in order to complete the 120 hours of leave? \_\_\_\_\_
7. Enter **/nZPAA076** in the Command field from the Quota Overview screen.
8. Click . The Employee Action Request screen displays.

9. Enter the following data:

Field	Value
<b>Personnel number</b>	Use the Data Sheet Ray Cryar personnel number that is assigned to your student number.
<b>Effective on</b>	First day of next month
<b>Action Type</b>	Leave of Absence
<b>Reason</b>	Extended Military


10. Click Enter .

11. Click Create . The second screen of the Employee Action Request screen displays.


12. Enter the following data:


Field	Value
<b>Annual Salary</b>	Same as the current salary (hint: look in Current column)

13. Click Enter .

14. Click Save . The Information pop-up displays with the assigned PCR number.

15. Write the PCR number on the employee paperwork (in class, use the Exercise Guide).

16. Click  to close the pop-up.

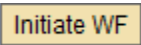
17. Click Services for Object . **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.


18. Select Create > Create Note.

19. Enter a note title.

20. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.

21. Click the green check  to close the notes. If applicable, close the notes icon menu.

22. Click . The Information pop-up displays indicating that the PCR has been submitted.

23. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).




24. You must now wait until the PCR has been approved and is back in your Inbox.

## Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There is one approval level:

- Agency

## Part III – Process Approved PCR as Initiator

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  Inbox to expand it.
3. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:
  - a. Select (do not double click) the PCR to select it.
  - b. At the bottom of the screen, click the Ad hoc object “header” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee’s name and PCR number).
  - c. At the Employee Action Request screen, click the Services for Object button to review the notes or attachments.
  - d. Select Attachment List.
  - e. Highlight the line item for the note.
  - f. Double click or use the eyeglasses.
  - g. Highlight the entire note, including the title.
  - h. Right click and select Copy. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
  - i. Click X to close the Display note popup.
  - j. Click X to close the Services for Objects popup. . **It is a best practice to make sure the PCR is closed before you process the approved PCR Actions** because an open PCR uses a lot of memory.
  - k. Click the Back button.
4. With the PCR still selected, click the Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).
5. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	First of next month.
Action Type	Leave of Absence.

6. Click Enter .

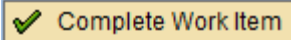
7. Click Execute .

8. Complete the following fields:

Infotype/Field	Value
<b>Actions (0000)</b>	
Reason for Action	Observe the field defaulted from WF.
Reference Per. No	Leave blank.
Position	Observe the field defaulted from WF.
E Group/Subgroup	Observe the field defaulted from WF.
Enter note copied from WF	<p>From the menu bar:</p> <ul style="list-style-type: none"> <li>• Select Edit</li> <li>• Maintain text.</li> <li>• Press Enter if a warning message displays indicating that person and position have different group/subgroup</li> <li>• Use Ctrl+V (or use the Insert button) to paste the note from the PCR.</li> <li>• Click Save.</li> <li>• Click <b>Enter</b> and <b>Save</b> as needed to bypass warning messages again.</li> </ul>
<b>Organizational Assignment (0001)</b>	<b>Enter</b> and <b>Save</b> .
<b>Monitoring of Tasks</b>	To view a list of your tasks, you must run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450) or BI report B0099
Task Type	Estimated return date
Date of Task	Starting with first of next month, count <b>calendar days</b> necessary to signify the end of the hours military training leave the employee will be gone (in this scenario, the employee has orders for 120 hours).
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.


Infotype/Field	Value
Comments	<p><b>NOTE:</b> Since the comments do not wrap at the end of the line, use the Edit &gt; Maintain Text function located on the menu bar to add the comments below to the infotype. Remember to start any comments with your name and the date. In your work environment, write whatever notes are required by your Agency. In class, we are only entering short notes for expediency. Enter the following:</p> <p>&lt;your name, date&gt; <i>Check to see if employee has returned on 121<sup>st</sup> day and reinstate if needed.</i></p> <p>Click <b>Save</b> to save the note. Observe the note icon displays as part of the infotype.</p> <p>Click <b>Save</b> again to save the infotype.</p>
<b>Delimit Objects on loan (0040)</b>	<p>Click <b>Next Record</b> icon.</p> <p>In your work environment, follow your Agency's policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.</p>
<b>Planned Working Time (0007)</b>	<p>If necessary, make the following selections:</p> <ul style="list-style-type: none"> <li>• Enter <b>D01N08GN</b> in the Work schedule rule field.</li> <li>• Change the Time Mgmt status to Positive Time Recording</li> </ul> <p><b>IMPORTANT!</b> All full-time employees must be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use <b>D01N08GN</b>. Part-time employees can be kept on their applicable part-time schedule.</p> <p><b>All employees</b> whether full-time or part-time <u>must</u> be positive time recording.</p> <p>When you reinstate an employee, the 0007 infotype displays as part of the Reinstatement Action. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.</p> <p><b>Enter and Save.</b></p>
<b>Subtypes for infotypes "Absences"</b>	<p>Select 9620 <b>Military Training</b> Leave.</p> <p><b>Important!</b> It is critical that you select this leave type so that the employee is paid from that leave "bucket".</p>

Infotype/Field	Value
<b>Absences (2001)</b>	
Start and to dates	<p>Start date: The date should default from the LOA effective date (first day of next month)</p> <p><b>To</b> date: Enter the date which is applicable for the number of leave hours being used from that “bucket”.</p> <p>Click <b>Enter</b>.</p> <p>Observe the <i>Quota Used</i> field to ensure that the date you entered calculated the hours correctly. If necessary, change the ‘to’ date until the calculation is correct.</p> <p>Click <b>Save</b> when the hours accurately calculate.</p>
<b>Subtypes for Time Quota Compensation Pop-up</b>	Click Cancel.


- Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).
- The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step.

You must now enter the hours of vacation the employee wants to use in order that he is paid during the entire 120 absence hours.

#### Part IV – PA30

- Enter **/nPA30** in the Command field from the Workflow screen.
- Enter **2001** in the infotype field, and select **Approved Leave** from the drop down menu in the subtype field.
- Click .

Absences (2001)	
Start and to dates	<p>Start date: Enter the date that equals the 81<sup>st</sup> day of the LOA (the next day <u>after</u> the “to” date entered in IT2001 in Part A of the exercise).</p> <p><b>To</b> date: Enter the date which is applicable for the number of leave hours being used.</p> <p>Click <b>Enter</b>.</p> <p>Observe the <i>Quota Used</i> field to ensure that the date you entered calculated the hours correctly. If necessary, change the ‘to’ date until the calculation is correct.</p> <p>Click <b>Save</b> when the hours accurately calculate.</p>

4. Remove the subtype from the subtype field so that only 2001 displays in the infotype field.
5. Click the **All** time period.
6. Click . You should see both leave type absences: the one you entered during the LOA Action (military training leave) and the one entered on PA30. The two leave types should total 120 hours.

### Questions

Answer the following questions.

#### Question 1

Assume the employee receives additional orders prior to being Reinstated back to work. The additional orders indicate he is to report to active duty immediately following the military training. The employee will not use leave. What steps would you take?

A.

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## 2.3 - Exercise: Leave of Absence – Workers Compensation

### Scenario

Patricia Calloway is a permanent employee at Cultural Resources as an Archaeologist II with the following leave balances:

- 200 bonus
- 600 sick leave
- 80 vacation

Patricia was injured on the job while performing her duties and will probably be out of work for a few months. She wants to use 40 hours of vacation during her 7-day waiting period. She is entitled to and wants to receive 2 hours per week of supplemental pay during the 6-month period.

In order for Patricia to receive the supplemental pay, either HR or Time will need to go in each week for the six months that the employee is out on WC LOA and add 2 hours supplemental time. It is important to communicate with Time to determine who will be responsible for entering the supplemental hours each week.

There are two separate LOA Actions that must be completed for this scenario:

- A. – LOA #1 (7-day Waiting Period)
- B. – LOA #2 (with Supplement)

Each LOA Action has three parts; however you will only be responsible for Parts I and III:




- I Initiate Workflow (WF)
- II Wait for approved PCR (LOA does not go to Funding Approver)
- III Process Approved PCR

### A.—LOA #1 (7-day Waiting Period)



#### Part I (of A) – Initiate Workflow (WF) for 7-day Waiting Period as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.






1. Determine how many of hours of sick leave the employee needs to have available if she is going to be out for 6 months from the scenario above:\_\_\_\_\_
2. Enter **PT50** in the Command field on the Easy Access screen
3. Press or click **Enter**.
4. Enter the employee's personnel number and press or click Enter.

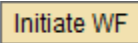

5. Click  All.
6. Click  Absence quotas. The Quota Overview screen displays.
7. Verify the Rem. Column for vacation and also sick leave:
  - Vacation: \_\_\_\_\_. Does the employee have enough vacation for the 7 day waiting period? \_\_\_\_\_
  - Sick \_\_\_\_\_. Does the employee have enough sick to use supplemental pay for 6 months? \_\_\_\_\_
8. Type **/nZPAA076** in the Command field on the Quota Overview screen.
9. Click . The Employee Action Request screen displays.
10. Enter the following data:

Field	Value
<b>Personnel number</b>	Use the Data Sheet Patricia Calloway personnel number that is assigned to your student number.
<b>Effective on</b>	Tomorrow's date (employees get paid for the first date injured)
<b>Action Type</b>	Leave of Absence
<b>Reason</b>	WC 7-day waiting period

11. Click Enter .
12. Click Create . The second screen of the Employee Action Request screen displays.
13. Enter the following data:

Field	Value
<b>Annual Salary</b>	Same as the current salary (hint: look in Current column)

14. Click Enter .
15. Click Save . The Information pop-up displays with the assigned PCR number.
16. Write the PCR number on the employee paperwork (in class, use the Exercise Guide).
17. Click  to close the pop-up.
18. Click Services for Object . **NOTE:** The Services for Object button displays either an icon menu or a drop-down menu depending upon whether you click on the right or left of the icon.
19. Select Create > Create Note.
20. Enter a note title.
21. Click in the note section and enter the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes you write are only recorded in the Workflow PCR; they do not follow to the PA Action.
22. Click the green check  to close the notes. If applicable, close the notes icon menu.




23. Click . The Information pop-up displays indicating that the PCR has been submitted.
24. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
25. You must now wait until the PCR has been approved and is back in your Inbox.

## Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There is one approval level:

- Agency

## Part III (of A) – Process Approved 7-day Waiting Period PCR as Initiator

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  to expand it.
3. Before you process the PCR, make a copy of the note in order to paste it into the Actions infotype:
  - a. Select (do not double click) the PCR to select it.
  - b. At the bottom of the screen, click the Ad hoc object “header” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee’s name and PCR number).
  - c. At the Employee Action Request screen, click the Services for Object button to review the notes or attachments.
  - d. Select Attachment List.
  - e. Highlight the line item for the note.
  - f. Double click or use the eyeglasses.
  - g. Highlight the entire note, including the title.
  - h. Right click and select Copy. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
  - i. Click X to close the Display note popup.
  - j. Click X to close the Services for Objects popup. . **It is a best practice to make sure the PCR is closed before you process the approved PCR Actions** because an open PCR uses a lot of memory.
  - k. Click the Back button.
4. With the PCR still selected, click the Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).
5. On the Personnel Actions screen, enter:

Infotype/Field	Value
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Infotype/Field	Value
<b>From</b>	Tomorrow's date
<b>Action Type</b>	Leave of Absence

6. Click Enter .

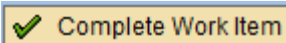
7. Click Execute .

8. Complete the following fields:

Infotype/Field	Value
<b>Actions (0000)</b>	
Reason for Action	Observe the field defaulted from WF
Reference Per. No	Leave blank
Position	Observe the field defaulted from WF
E Group/Subgroup	Observe the field defaulted from WF
Enter note copied from WF	<p>From the menu bar:</p> <ul style="list-style-type: none"> <li>• Select Edit</li> <li>• Maintain text.</li> <li>• Press Enter if a warning message displays indicating that person and position have different group/subgroup</li> <li>• Use Ctrl+V (or use the Insert button) to paste the note from the PCR.</li> <li>• Click Save.</li> <li>• Click <b>Enter</b> and <b>Save</b> as needed to bypass warning messages again.</li> </ul>
<b>Organizational Assignment (0001)</b>	
<b>Monitoring of Tasks</b>	To view a list of your tasks, you must run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450) or B0099 in BI.
Task Type	Workers Comp (7-day)
Date of Task	Starting with tomorrow, count <b>calendar days</b> to the date that signifies the end of the 7-day waiting period.
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
Comments	The 7-day waiting period ends. Change the record on the 8 <sup>th</sup> day to a new LOA and WC reason.

Infotype/Field	Value
<b>Delimit Objects on loan (0040)</b>	Click Next Record icon In your work environment, follow your Agency's policy regarding whether or not employees should return items while out on leave. If the employees return the items, then you would delimit the infotype.
<b>Planned Working Time (0007)</b>	<p>If necessary, make the following selections:</p> <ul style="list-style-type: none"> <li>• Enter <b>D01N08GN</b> in the Work schedule rule field.</li> <li>• Change the Time Mgmt status to Positive Time Recording</li> </ul> <p><b>IMPORTANT!</b> All full-time employees must be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use <b>D01N08GN</b>. Part-time employees can be kept on their applicable part-time schedule.</p> <p><b>All employees</b> whether full-time or part-time <u>must</u> be positive time recording.</p> <p>When you reinstate an employee, the 0007 infotype displays as part of the Reinstatement Action. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.</p> <p><b>Enter and Save.</b></p>
<b>Subtypes for infotypes "Absences"</b>	Select Approved Leave
<b>Absences (2001)</b>	
Start and to dates	<p>Start date: The date should default from the effective date of the LOA Action.</p> <p>To date: The date which is applicable for the number of leave hours being used. In this scenario, you need 5 Absence days to constitute the 40 hours.</p> <p><b>Enter and Save.</b></p>
<b>Subtypes for Time Quota Compensation Pop-up</b>	Click Cancel.

- Click the Back button at the Personnel Actions screen (the system automatically returns you to Personnel Actions when you finish the last infotype within the Action).

10. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step.

***A.— LOA#1 (7-day Waiting Period) is complete.***

## B. -- LOA#2 – Create LOA WC Leave of Absence w/supplement

### Scenario


Assume it is 7 days from the date Patricia Calloway was injured. According to your Date Monitoring report, the LOA for her WC first 7 days has ended. She indicates that she will be unable to work for six months. Place Patricia on LOA with the applicable reason. Either HR (best practice) or the Leave Administrator will have to enter the 2 hours sick leave every week for the supplemental pay.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR (LOA does not go to Funding Approver)
- III Process Approved PCR

### Part I (of B) – Initiate Workflow for WC with Supplement as Initiator

Access the Business Process Procedure (BPP) from Help > BEACON Help. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, type **ZPAA076** in the Command field.
2. Click . The Employee Action Request screen displays.
3. Enter the following data:

Field	Value
<b>Personnel number</b>	Use the same Data Sheet Patricia Calloway that you previously used
<b>Effective on</b>	Eight days after the <b>start</b> date of the 7-day waiting period (or, one day after the end date of the 7-day waiting period)
<b>Action Type</b>	Leave of Absence
<b>Reason</b>	WC LOA with supplement

**NOTE:** To complete Part I, use the information you learned from previous exercises to:

- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

### Part II (of B) - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There is one approval level:

- Agency

**Part III (of B) – Process Approved WC with Supplement PCR as Initiator**

**NOTE:** For Part III (of B), use the information you learned from previous exercises to process the approved PCR:

- Access the Inbox
- Highlight the PCR and copy the note
- Execute the approved PCR
- Enter the applicable date and Action on Personnel Actions screen
- Process the infotypes as applicable
  - Actions: paste the note from the PCR
  - Monitoring of Task – this time the date is at the end of six months and the reason is “estimated return date”
- Explicitly complete Workflow item

***B. – LOA#2 WC w/supplement is complete.***



## **LOA Overview for 7-day waiting period (non-consecutive days)**

**NOTE:** You will not perform an exercise. This is presented for discussion purposes only.

The 7-day waiting period begins with the first day missed after the day of the accident (employees are paid in full the day of the accident regardless of what time they went out). The 7 days can be consecutive or non-consecutive. When an employee is out for the 7-day waiting period, you count calendar days (which includes the weekends). If the employee is out a partial day with lost wages, you count that as one whole day. You would not count doctor's appointments or treatments for the accident as absences because employees are paid as if they worked for reasonable time and travel to the doctor. The determining factor for counting is lost wages.

For the purposes of illustration, we will assume that an employee (Shirley James) gets hurt on Thursday, 1/10/09 at 9:00 a.m. She gets paid for that day. Shirley goes to the doctor and misses the rest of the day and does not come back on Friday. Shirley has chosen not to take leave for the 7-day waiting period. That makes 1/11/09 the first lost workday (initiate step 1 below). Shirley returns to work on Wednesday 1/16/09 (initiate step #2 - Reinstatement). When you enter the Reinstatement, the previous LOA Action is automatically delimited to 1/15. That means that the system has counted days 1/12, 1/13, 1/14, and 1/15 as lost days 2 through 5 (which includes Saturday, Sunday, Monday and Tuesday). She works through 1/21. She calls on Tuesday 1/22 to say she has a doctor's appointment. The doctor takes her off work duty indefinitely (initiate step #3). Benefits would begin on the 8th lost day which is 1/24 (initiate step #4). The system automatically calculates her last two lost days in the 7-day waiting period as 1/22 and 1/23.

1. LOA Action – WC 7-day waiting period, dated 1/11 until end of time
2. LOA Reinstatement—WC complete, dated 1/16 until end of time (which delimited #1 to 1/15)
3. LOA –WC 7-day waiting period, dated 1/22 until the end of time (which delimited #2 to 1/21)
4. LOA—either WC Leave of Absence or WC LOA w/supplement, dated 1/24 until the end of time which delimited #4 to 1/23)

## 2.4 – Exercise: Leave of Absence – Military

### Scenario

Kumar Reinaldo is a permanent employee at Cultural Resources.

He received active duty orders for 18 months beginning **May 5th**. He is not eligible for differential pay. He wants to use a 160 hours of a combination of vacation and bonus leave prior to starting his 30 days Reserve Active Duty.

In this scenario, the Memorial holiday is included in the time frame for which he wants to use leave. Therefore, you will enter the approved leave on the original LOA **up to** the date of the holiday, and then do a PA30 to enter the holiday and another PA30 to enter the remaining leave dates to total 160 hours.

**NOTE:** If an employee is eligible for differential pay, you must coordinate with your Agency's **Payroll** office to ensure that you send them the proper paperwork so that the employee is paid the differential amount while out on military leave.

Three LOA Actions must be completed for this exercise. In your work environment, you must process each LOA via ZPAA076:

- A. LOA #1 – Military (Leave)
- B. LOA #2 – Military (30 Days)
- C. LOA #3 – Military (Reserve Active Duty)


For this exercise only and only in training, you will by-pass Workflow. **Caution! You will never by-pass Workflow for this type of Action in your work environment.**

### A. LOA #1 – Military (Leave)



#### Part I (of A) – Initiate Military (Leave)

**NOTE:**

- You will receive a warning message on each infotype indicating that the previous record will be delimited. Press Enter to accept the message.
- When the class is taught from June – December (after the May payroll run), you will get a message that it is in a past payroll period. Press Enter to accept the message.

1. Access PT50 to verify he has applicable military and vacation accruals.
2. On the Easy Access screen, type **PA40** in the Command field (**Caution! In your work environment, you will use ZPAA076 for Workflow—this is used as a short-cut for training only**).
3. Click . The Personnel Actions screen displays.
4. Enter the following data:

Infotype/Field	Value
<b>Personnel no.</b>	Use the employee assigned to you on the Data Sheet.
<b>From</b>	05/05/2009
<b>Action Type</b>	Leave of Absence

5. Click Enter .
6. Click Execute .
7. Complete the following fields:

Infotype/Field	Value
<b>Actions (0000)</b>	
Reason for Action	Reserve Active Duty (Leave). <b>NOTE:</b> In your work environment, this field will default WF.  Also in your work environment, you would paste the note from the PCR. Since we by-passed workflow for training expediency, there is no note to paste.
<b>Organizational Assignment (0001)</b>	Save
<b>Monitoring of Tasks</b>	
Task Type	Estimated Leave Run Out
Date of Task	Date: <enter appropriate date>. Use the calendar icon to select the date that will indicate when the 160 hours of leave will be used. Don't forget the start date in this exercise is May 5, 2009.
Comments	Use Edit > Maintain text and enter the following text:  "Ends the 160 hours leave that employee requested to be used. Enter a new LOA for 30 days the State will pay."
Reminder Date	Press Enter.  When you press Enter, the reminder date field automatically populates. Change if applicable.

Infotype/Field	Value
<b>Delimit Objects on loan (0040)</b>	Click Next Record icon  In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employees return the items, then you would delimit the infotype.
<b>Planned Working Time (0007)</b>	If necessary, make the following selections: <ul style="list-style-type: none"> <li>• Enter <b>D01N08GN</b> in the Work schedule rule field.</li> <li>• Change the Time Mgmt status to Positive Time Recording</li> </ul> <p><b>IMPORTANT!</b> All full-time employees must be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use <b>D01N08GN</b>. Part-time employees can be kept on their applicable part-time schedule.</p> <p><b>All employees</b> whether full-time or part-time <u>must</u> be positive time recording.</p> <p>When you reinstate an employee, the 0007 infotype displays as part of the Reinstatement Action. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.</p> <p><b>Enter and Save.</b></p>
<b>Subtypes for infotype Absences pop-up</b>	Select Approved Leave (because employee is using both vacation and bonus)
<b>Absences (2001)</b>	
Dates	Date: Start <enter date of Action> To: <enter appropriate date>. Use the calendar icon to select the date <b>up to</b> the May 26th Memorial holiday.  <b>Enter and Save.</b>
<b>Subtypes for infotype Time Quota Pop-up</b>	Skip for this scenario because the employee cannot use leave and receive a lump sum payout too.

- You are returned to the Personnel Actions screen. **Important!** In your work environment (because you went through WF) you will click the Back button at the Personnel Actions screen and then click the **Complete Work Item** button to explicitly complete the work flow.

<b>PA30</b> <b>Absences 2001 infotype</b>	Create Subtype 9300 – Holiday. Enter dates for the Memorial Holiday, 5/26/2009 to 5/26/2009. The total hours should calculate to 8 hours.
<b>PA30</b> <b>Absences 2001 infotype</b>	Create Subtype 9000 – Approved Leave. Enter the remaining dates it will take to complete the 160 hours that the employee wants to use (in this case, you have already entered 120, so you only need to enter dates for 40 hours)  <b>Write down the end date that was calculated because the day after this date is the effective date of your next LOA Action.</b>
<b>PA30</b> <b>Monitoring of Task 0019 infotype</b>	Create Task Type: Estimated Return Date  Date: Enter the date the orders indicate the employee will be finished with military duty (18 months).  Enter a note that indicates the employee’s order for 18 months ends.
<b>PA30</b> <b>Absences 2001 infotype</b>	To see an overview of the Absences that you have entered, make sure the subtype field is blank, click the “All” time period, and the Overview button. The list should display the two leaves and one holiday. You can ensure that you have accurately entered the leave dates to total 160 hours.


***A.-- LOA #1 – Military (Leave) is complete***

## B. LOA #2 – Military (30 days)



You must now enter the second LOA Action for Kumar Reinaldo for the 30 days which he will be paid by the State.

For this exercise only and only for training, you will by-pass Workflow. **Caution! You will never by-pass Workflow for this type of Action in your work environment.**

### Part I (of B) – Initiate Military (30 days) PCR as Initiator

1. On the Easy Access screen, type **PA40** in the Command field (**Caution! In your work environment, you will use ZPAA076 for Workflow**).
2. Click . The Personnel Actions screen displays.
3. Enter the following data:

Infotype/Field	Value
Personnel no.	Use the employee assigned to you on the Data Sheet.
From	One day <b>after</b> the end date of the last LOA
Action Type	Leave of Absence

9. Click Enter .
10. Click Execute .
11. Complete the following fields:

Infotype/Field	Value
<b>Actions (0000)</b>	
Reason for Action	Reserve Active Duty (30 days). <b>NOTE:</b> In your work environment, this field will default WF.
<b>Organizational Assignment (0001)</b>	Save
<b>Monitoring of Tasks</b>	To view a list of your tasks, run the <i>Date Monitoring Report</i> (transaction S_PHO_48000450).
Task Type	30 days
Date of Task	Date: <enter appropriate date>. Use the calendar icon to select the date that indicates the end of the 30 days being paid by the State.
Comments	Use Edit > Maintain text and write:  “Ends 30 days paid by State. A new LOA needs to be created for Active Duty Regular”

Infotype/Field	Value
Reminder Date	When you press Enter, the reminder date field automatically populates. Change if applicable.
<b>Delimit Objects on loan (0040)</b>	Click Next Record icon  In your work environment, follow your Agency's policy regarding whether or not employees return items while out on leave. If the employees should return the items, then you would delimit the infotype.
<b>Planned Working Time (0007)</b>	Save (this should already be populated because you entered the correct information in the first LOA).
<b>Subtypes for infotype Absences pop-up</b>	Select Military Active Duty.
<b>Absences (2001)</b>	Start date: The same date as the date of the Action  To date: 30 calendar days from the date of the Action  <b>Write down the end date because the day <u>after</u> this date is the effective date of your next LOA Action.</b>
<b>Subtypes for infotype Time Quota Pop-up</b>	Select the icon to close the pop-up.

12. You are returned to the Personnel Actions screen. **Important!** In your work environment (because you went through WF) you will click the Back button at the Personnel Actions screen and then click the **Complete Work Item** button to explicitly complete the work flow.

**B. -- LOA #2 – Military (30 days) is complete.**

### **C. LOA #3 – Military (Reserve Active Duty)**

You must now enter the third LOA Action for Kumar Reinaldo for the remaining time that he will be away on leave.

For this exercise only and only for training, you will by-pass Workflow. **Caution! You will never by-pass Workflow for this type of Action in your work environment.**

#### **Part I (of C) – Initiate PCR for Military Reserve Active Duty**

To complete Part I (of C), use the information you learned from the previous military LOAs to:

- Create new LOA
  - Start date is one day after the end date of the second LOA
  - Action: LOA
  - Reason: Reserve Active Duty
- Process each infotype as applicable:
  - Monitoring of Tasks date: 30 days with a comment that indicates that you are checking the status of the employee
  - Planned Working Time should have defaulted from your previous entry so you do not need to make any changes.
- You are returned to the Personnel Actions screen. **Important!** In your work environment (because you went through WF) you will click the Back button at the Personnel Actions screen and then click the **Complete Work Item** button to explicitly complete the work flow.

***C. -- LOA #3 – Military (Reserve Active Duty) is complete.***



## Questions

Answer the following questions.

### Question 1

True or False: If an employee is a permanent full-time (40 hours a week) employee, D01N08GN code is appropriate to use in the work schedule rule on the Planned Working Time infotype?

A.

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### Question 2

What step must be taken to ensure that an employee who is eligible for differential pay and is going out on Military LOA receives his or her differential pay?

A.

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### Question 3

In BEACON, you may have to enter two or more Actions to indicate that an employee is on LOA. Why is this an advantage over the previous system process where only one Action was needed?

A.

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### Question 4

How do you ensure that the employee will be paid the State paid 30 days military leave?

A.

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This exercise is complete.

## 3.1 - Exercise: Reinstatement

### Scenario

Patricia Calloway (the same employee from a previous exercise) has fully recovered and is released to return to work. Assume today is six months since the effective date of her initial LOA. Reinstatement Patricia from LOA. You can refer back to the date you entered on the Monitoring of Tasks as the estimated return date to use as the effective date for this Action.

Patricia will return to the same work schedule and time management type as she was prior to going on LOA which was:

- D01N08GN
- Negative time employee

**NOTE:** Employees do not necessarily return to the exact work schedule they were on prior to LOA. You will have to verify each time before you process the Reinstatement.

### Part I – Initiate PCR as Initiator

To complete Part I, use the information you learned from previous exercises to:

- Access ZPAA076 and enter the applicable data to process the PCR:
  - Date: six months from the original LOA
  - Action: LOA
  - Reason: Return from WC complete
- Save the PCR and receive the PCR number
- Write a note for the approvers
- Initiate Workflow

### Part II - Instructor or Navigator will Approve the PCR

Note to instructor and navigator: There is one approval level:

- Agency

### Part III – Process Approved PCR from Initiator's Inbox

**NOTE:** For Part III, use the information you learned from previous exercises to process the approved PCR:

- Execute the approved PCR
- Enter the applicable data on Personnel Actions screen
- Process each infotype as applicable

- Return the employee to the correct Work Schedule and Time Management Status
- Explicitly complete Workflow item

### Questions

Answer the following questions.

#### Question 1

When you reinstate an employee who has been out on LOA, what infotype should you check to make sure you restore correctly?

A.

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This exercise is complete.